CHAPTER 1
WHY EFFECTIVE INFLUENCE

"Oh wad some power the giftie gie us,
To see ourselves as others see us!"

ROBERT BURNS

PERSONAL VS INTERPERSONAL LEARNING

Personal learning offers insight into our own motivations and needs, the influences of our pasts, and self knowledge. Some forms of personal learning involve "why" and "what" questions — "Why did I react that way to so-and-so?" "What do I want from this person, and why do I want it?" Insights come from within, and each person has their own answers. Personal learning might be improved through reading, therapy or advice, but others are not necessary to it.

Forms of personal learning with non-European roots, like Yoga and Buddhist meditation, emphasize that everything we can ever know, we know through our bodies. Sensation takes priority over meaning, the present moment over memory. Though each person seeks alone, answers are transpersonal because we experience the world through the same senses. However, answers are still to be found inside. Buddha achieved enlightenment sitting under a tree, alone.

By contrast, *Effective Influence* is about learning interpersonally about "how": how we each gauge or create safety, meet needs, manage anxieties, lose effectiveness, influence others, handle conflicts, deal with authority, and so on. Because everyone realizes these tasks differently, and diverse others react differently, there are no one-size-fits-all answers. Learning interpersonally includes practicing with others, so as to develop the flexibility to achieve goals with a broad range of people. Only others can shed light upon our actual impact, as distinct from what we intended, hoped for, or decided after the fact.

Effective Influence is about increasing behavioral ranges, not changing who we are. Most of us play to our strengths, like surgeons who see medical interventions, clergy who see spiritual ones and athletes who see challenges to overcome. There is nothing wrong with these, but we can each overlook the obvious sometimes. At *Effective Influence*, skill-based models are presented to encourage attendees to try out different avenues.

Effective Influence is about experimenting with choices we frequently don't allow ourselves to choose. Any mistakes made among strangers won't follow us home, so the stakes are low. While drawing upon our strengths, most of us also forego opportunities to develop our flat sides. If we gave ourselves license to practice, risk mistakes and learn by doing rather than judging with limited data, we could develop new strengths. As toddlers, we all learned by trying. When adults have increased safety to try new things, learning accelerates likewise.

Effective Influence is about practicing new ways. We can all eclipse our own choices by feeling helpless, ashamed or guilty, by believing that we are at the mercy of others, or acting as if fight, flight and surrender cover the range of possible responses when needs are in conflict. *Effective Influence* offers opportunities to evaluate what happens when we try out new ways, rather than foregoing opportunities to try by pre-judging that they will fail. We are all clumsy when we try out new ways; more practice and some consultation can help us to perfect them.

Effective Influence is about further developing the skills to learn from others who differ from ourselves in personality, temperament or culture. It is about knowing how to build relationship & team climates that support success and continuous learning with diverse others outside of *Effective Influence*.

Effective Influence is about exploring authenticity as a way of being powerful. Each of us is unique, and strengths arise from that uniqueness. Not being ourselves is usually a less effective choice, and yet most of us play roles instead of being who we are, a lot of the time. Each of us can risk showing more of ourselves, in order to learn how that impacts others.

INTERPERSONAL COMPETENCIES

Building interpersonal competency never ends. With each new relationship, we have to find appropriate ways to raise issues, build trust and accomplish tasks. What works for me might not work for you, because we are different people with different backgrounds, and do not go about things in the same way. We can, however, delineate common interpersonal tasks:

:: "How can I mesh my style (how I get things done) with others who have different styles?"

:: "How can I acquire new skills, new ways of operating, while still being true to myself?"

This conference gives you the chance to continue to learn "with training wheels." Group members are strangers; trying out new behaviors is encouraged; both successes and failures can be debriefed.

:: "How do I work smoothly and synergistically with those culturally different from me?"

:: "How can I be me more often, rather than changing to please each new person?"

:: "How can I build trust in a short period of time, especially with another whose initial actions have made me somewhat mistrustful?"

:: "How do I handle conflict and disagreements so that the problems are resolved without anyone getting bloody, or our relationship damaged?"

"I haven't read it yet, but I've downloaded it from the internet."

:: "How do I manage my reputation while forming authentic relationships that motivate colleagues to care about me and my career?"

:: "How can I get my needs and objectives met without running roughshod over yours?"

:: "How much of myself can I show, or should I play a role? How vulnerable or mistaken can I be before losing status, influence or relationships?"

:: "How can I express my feelings and needs without appearing weak, woo-woo or touchy-feely?"

:: "How can I give feedback in a constructive way, so that it is heard and considered? And, how can I receive feedback without appearing weak or turning my own security over to others?"

:: "How do we understand and resolve the often subtle misunderstandings that occur when we do not share a common (or first) language?"

To complicate interpersonal competencies further, our world is becoming increasingly diverse. Knowing how to encourage people with different viewpoints and identities, as well as how to adapt to them and derive strength from varied perspectives, is becoming a critical skill in most managerial or leadership roles.

For example, many Latin cultures share the value called *personalismo* by researchers, the emphasis upon connecting on a personal level upon first meeting, each day. *Personalismo* not only co-creates a social space, but also supports collaboration for the rest of the workday. (In colloquial usage it can also mean the cult of personality around a corrupt leader, but that is not the meaning that we refer to here.)

How many non-Latin managers understand the impact upon team effectiveness of discouraging *personalismo* on teams with Latin members, or how they may be seen as holier-than-thou if they don't act similarly? Moreover, if a manager's own values lead her to pursue time efficiency, will she see the cost of discouraging *personalismo* if time is not devoted to strengthening collaborative relationships on teams?

GROUP COMPETENCIES

Groups tend to arouse strong emotions for people. Along with building relationships, a central dilemma of the human condition is also to balance the pressures to belong and conform in groups with a need to be seen and valued as a unique individual. Accordingly, there are team and group competencies that are involved in maximizing interpersonal learning.

::   "What can build a group climate safe enough that members can raise their real concerns?"

::   "Even though we need to influence each other, how can I ensure that team members retain their individuality on a team that is neither too coercive nor too conformist?"

::   "How do we reconcile our various individual goals while meeting organizational objectives?"

::   "How can the teams that I join be high performing, a.k.a. be more than the sum of their parts?"

::   "How can I recognize which leadership style is called for on a given team, at a given moment?"

::   "How can I ensure that safety needs are met, so that we can raise and resolve the real issues?"

::   "What developmental stages occur in groups, and how can I work effectively with them?"

This interpersonal and intergroup complexity is, well, complex. Cross-cultural issues make effective teaming even more complex. The sense that others are behaving atypically or oddly, *when viewed from within our own cultural frames*, can be almost overpowering. Culture, for all of us, is simply what is normal. Like the air we breathe, it is not typically noticed except by its absence. Therefore, culture is rarely debriefed in casual interactions.

When open conversation does occur, there are power dynamics that can trip the unwary. Many minority groups live their whole lives within the majority group's (different) context. Not having had guidebooks themselves, they may not be eager to teach others about what that was like, or why it matters. This reluctance occurs, in part, because there is no such thing as a "group representative" and minority group members are also individuals.

However, the desire of dominant groups to be taught can be seen as "taking the easy way out" by minority groups, no matter how well-intentioned or curious the audience. Some groups have the privilege of not needing to explain, because the answers are on TV and all around; other groups are asked to explain their experiences frequently. Fatigue is a common response to the questions and ensuing reactions.

The "group representative" stereotype can also be found having more subtle effects. It is not uncommon for people of color to observe that, when they speak with some majority group members, their area of difference becomes a topic almost every time: in my (Freeman's) case, race often claims a disproportionate share of the majority group member's awareness. Similarly, LGBT communities can have members from every culture on Earth. The diversity of views and experiences represented is enormous. Like all groups, LGBT communities can be both united and divided, depending upon the issue or moment... yet sometimes are seen as a "single" community (with, sometimes, an equally stereotypical "gay agenda").

In contemporary Western society, we tend to jealously guard the sanctity of the individual. Other cultures do so less often. In Chinese families, for example, role expectations are very much stronger than in Western society. Or in Southeast Asia, where during her initial weeks in Micronesia, American anthropologist Catherine Lutz asked a group of young women, "Do you want to come get drinking water?" She writes:

> "Faces fell, and I realized with later experience and reflection that my pronouns were at fault... The usual and more correct form... would be "We'll go get water now, O.K.?" To say, "I am going to get water" may communicate the intention of striking out on one's own, without regard for the needs of others, either for water or for companionship... using "I" rather than "we" when speaking of such... qualities as compassion, love or sadness can be considered boasting, putting one's self above and apart..."
> *--as cited in Thomas (2000), p.37–38*

This seemed very exotic to my (Jay's) Western ears, until I realized that I had experienced identical exchanges in English with my Singaporean sister-in-law, who often says things like, "We eat lunch now, OK?" My answers, such as "No thank you, I had a late breakfast," might have been untoward... nor would she have told me. When such cross-cultural misunderstandings occur in the workplace, they are rarely discussed because they are complicated and happen so quickly. More attention to cross-cultural dynamics can improve relationships.

My (Jay's) reactions will also vary depending upon whether, in a given moment, I am aware of myself as White, male, big, middle class, educated, married, able-bodied, etc. And yet, how I am aware of myself may have little to do with *how I am viewed*. In this instance, my sister-in-law likely saw me acting typically *mat salleh* ("White person behaving as such") that was not even in my awareness.

Each of us is unique, whereas roles and generalities are abstractions. They are usually less effective than being ourselves.

THE MOST IMPORTANT COMPETENCY

The most important "how" of all is **"how do I learn how to learn?"** That is, what does it take to set up a learning environment where I, you, and we continuously learn? This is a challenging task - learning how to learn together. As team members, professionals and leaders, learning from experience is a competency that never stops delivering.

This conference gives you the chance to learn by doing, not just by thinking about doing. It offers learning "with training wheels." Group members are strangers; trying out new behaviors is encouraged; successes and failures are debriefed, and we've all agreed to help one another by offering and receiving feedback. After practicing away unskillful edges, you can bring the fruits of that learning to other places.

We hope that you will also then feel more comfortable to engage in experiential learning with supervisors, subordinates and peers, without the training wheels. You will know more about building and maintaining the conditions for such learning, both transitory and long-lasting. With more opportunities to continuously expand skills, the more influence you can build.

The ability to react flexibly is one of the hallmarks of mental health. Another is a sense of felt security (Sroufe, 1977) that tells us emotions can be managed, problems solved and core needs met. Felt security provides safety in times of crisis and the security that enables exploration, freeing us to learn to be more choiceful in our reactions. This conference bolsters this in-built process by co-creating safety and security.

CHECKING OUT ASSUMPTIONS

In group life as in other places, you will find yourself receiving feedback based upon the choices that you have made. Pay attention to the assumptions and judgments that you are making, about yourself and about others. You can examine how they limit your choices, and experiment with noticing your judgments without allowing them to foreclose options. Typically, that means taking the risk of asking about assumptions before accepting them as facts. Instead of wondering if someone thought that you sounded stupid, smart, insensitive, etc. (and berating either self or others), you can simply ask. Or tell.

We all make assumptions and judgments to make sense of the world. And, we all handle assumptions and judgments in our own ways. Some assumptions we will seek to check out; some will be challenged in the regular course of things; some will simply slide by unnoticed in the subtext, maybe oversimplifying or involving error. For better or for worse, it is difficult to question long-held assumptions, especially if we have already made up our minds before engaging in conversation. This conference affords opportunities to disclose more of the assumptions that affect our daily choices, exploring a broader range of behavioral choices by challenging assumptions so group members can help one another explore options.

*"We just haven't been flapping them hard enough."*

EXPERIENTIAL LEARNING CYCLE

Learning is a process. For example, reading this sentence is a learning process, but not very engaging. Reading about learning is rarely as rich as actually learning. At the conference, we try to accelerate the process of learning not only through insight (what works, what doesn't) but also by practicing new behaviors with feedback from others and, therefore, help from a group in calibrating them.

Like all learning processes, the cycle below is **circular** and **idiosyncratic**. We each tend to be more aware of what we customarily attend to. For example, look at the clockface below. If you have trouble making decisions, you likely get stuck before 12:00--to take an action, you foreclose other options. If you are very evaluative, maybe you spend a lot of time conceptualizing and generalizing, and so spend less time trying out new options or suspending judgment. If you become easily overwhelmed, you may be getting stuck in experiencing, or over-attend to processing. Or you may not get stuck at all.

At *Effective Influence*, you can direct your attention to the less familiar: there's more bang for the buck where you don't ordinarily expend much effort.
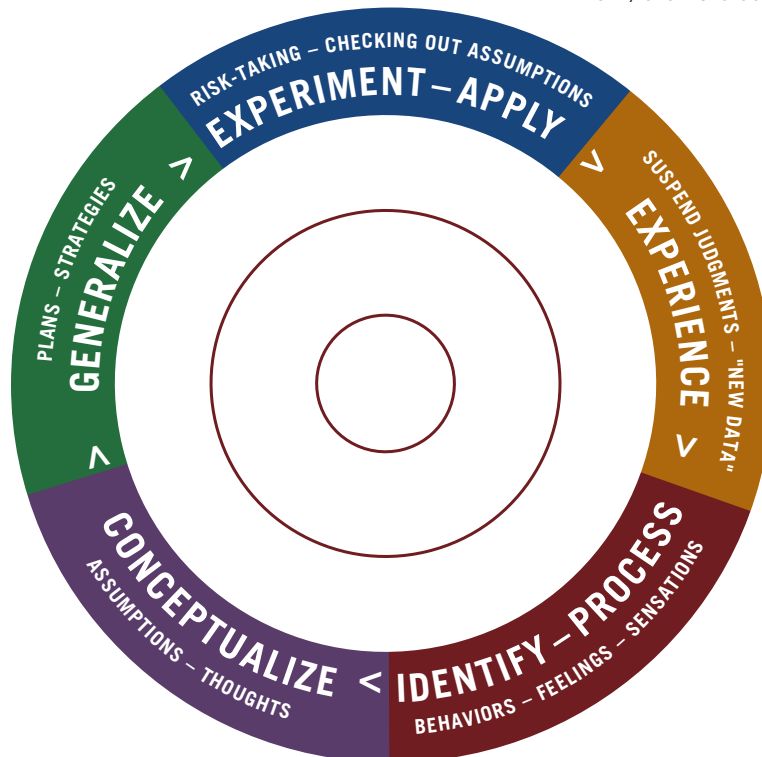
There is an old saw about a man who sought his lost keys at night, under a streetlight. A puzzled friend said, "Did you drop them here?" He answered, "No, over there. But over there it is dark, so I thought I would look where there is light." Sometimes, you have to risk the unknown to find what you are seeking.

Sigmund Freud's concepts were so influential that many entered everyday usage, like *projection* and *unconscious*. However, others remain controversial. For example, he likely worked with many women who had been molested. He initially believed them, but later decided that their tales were fantasy because he could not reconcile the prevalence of such histories with his notions of society. Inaccurate conceptualization = overgeneralized conclusions.

If the most **bang for the buck** can be found in seldom-visited places. If you generalize well, try experimenting. If your judgment is sound, suspend judgments and try something atypical instead. **There aren't right or wrong ways**, but one of the best ways to stretch into the unfamiliar is to **ask for support** and try something new. We can't guarantee that you'll find every model presented at the conference useful. We can say confidently that you'll learn more by suspending judgments, trying out new skills... and only *then* evaluating the outcomes.

Fig 1. EXPERIENTIAL LEARNING CYCLE

Learning is also **cyclical** and deepens with each pass through the cycle. One is hardly ever finished learning... though we can, and do, often say "good enough." Learning is also a **component** process, more effective when all parts receive attention. Without experience we lack data; without data we cannot process. Without data and processing, we may conceptualize or generalize inaccurately, and thereby make unsound decisions or take mistaken action.

Risk at the conference is another important topic. Learning can be gained in tiny, careful cycles that don't range very far from what is already known, and therefore, teach only a small amount. On the other hand, risking little can mean missing great opportunities: at the conference, **nothing ventured, nothing gained** is one of the most true descriptions.

On the other hand, dramatically increased risk can be uncomfortable, unwise and even reckless. Moving too far outside of our own comfort zones too quickly can also decrease safety. A not-uncommon example might be the person who would rather be right than kind. Absolute honesty may serve some purposes, but messages can go astray if they not phrased so that the recipient can hear them. At the conference, we hope for enough risk to maximize learning, but not too much. Another important point is that what feels risky to me may not look risky to you. **You are the best judge of your own level of risk**, at the conference as everywhere. And, because people differ by virtue of style, temperament and culture, what is easy for you may be difficult for me.

Riskiness is also a moving target. As you get to know your workgroup, what felt risky on Day 1 will likely be too safe on Day 2. Among strangers who may never gather again, **feelings of riskiness may also be miscalibrated**: what is truly endangered by risking a mistake where joint problem-solving is encouraged? A mistake can "bring into the room" behaviors that you can profitably explore, while others can offer suggestions and provide opportunities to practice.

Such opportunities are often foregone: mistakes are costly when supervisors (or colleagues vying with you for promotion) are watching! The co-created, organic nature of *Effective Influence* is fine-tuned for learning because attendees commit to support one another honestly, while building the skills to help strangers who depart after skills are practiced.

Fig 2. ZONES OF RISK
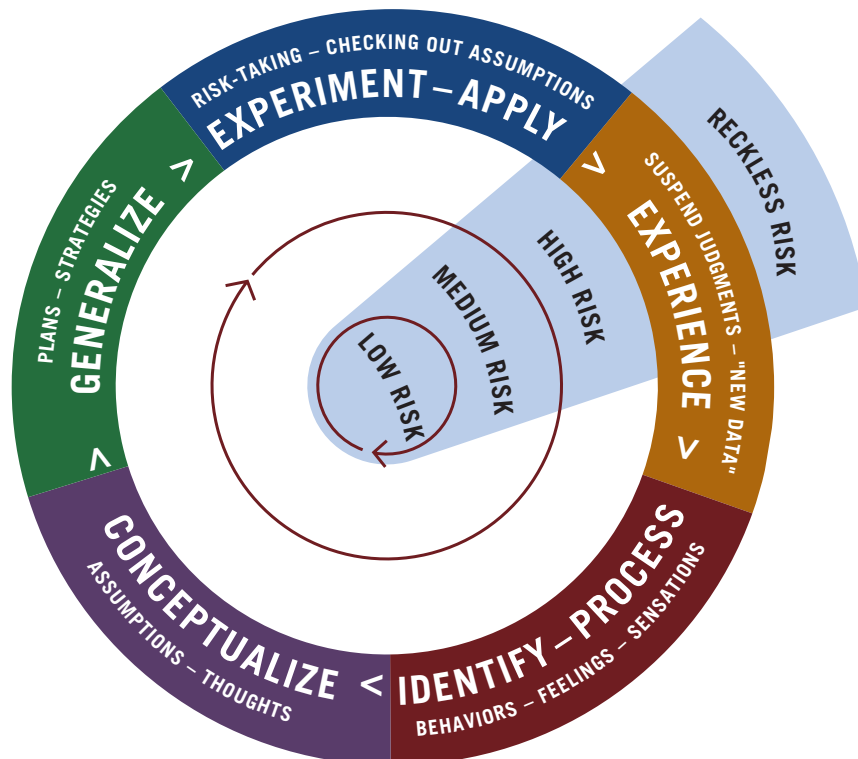
SOURCE: NOEL, JUDITH G. (2004) FROM PAPERS PRESENTED AT THE EFFECTIVE INFLUENCE CONFERENCE. ADAPTED FROM GALLANT, S. M. (1999) "CULTURAL ASSUMPTION IN CROSS-CULTURAL RELATIONS" IN READING BOOK FOR HUMAN RELATIONS TRAINING, 8TH EDITION, NTL INSTITUTE, 103-110.

WHY LEARNING BY DOING WORKS

Jean Piaget is famous for his descriptions of child learning. Piaget told us that children evaluate what they see by acting as "little scientists", constantly dropping, throwing and touching to find out what happens. As many an exasperated parent can testify, a single "experiment" is often not enough for a child happily discovering that spoons and plates make different sounds when banged on the table, or that dropped Cheerios roll, whereas baby food splats.

Sometimes children learn the wrong lesson. Their "experiments" involve logical errors, are pooly executed or miss important details. A dog bark may result in a phobia... even though it barked because someone stepped on its tail. Kids may fail at a task and conclude that they have no aptitude for something when, in fact, that aptitude could have been developed at age 7 or 9 (or 45), if not at 4. These lessons may live on, untested and unnoticed. Some kids learn that they can't do math or control their tempers, others that people can't be trusted... foregoing opportunities to learn when that is true or not, and build new skills.

We were all children when we began learning about people. We all had different experiences, were granted different aptitudes and surrounds, and drew different conclusions. We can be equally certain that many of those conclusions might no longer hold true for us as adults, if only we were given the chance to revisit assumptions, gather new data and practice new ways with an adult's eyes and comprehension.

These chapters present food for thought in a one-size-fits-all fashion, whereas learning at the conference will be experiential, personal and organic... duplicating the learning conditions of early childhood. In a nutshell, this is why *Effective Influence* works for such a broad cross-section of people and behaviors. By setting up a safe environment for experimentation, challenging assumptions, trying out new behaviors and debriefing them, we duplicate the conditions for learning that comprised our very first lessons about other people. As for children, *Effective Influence* enlists others to extend the depth and range of learning.

This means that your active participation is crucial in early sessions, so that your goals are "in the mix." You get out what you put in: though introverts are an important part of any group, when the group is still forming, being quiet means acting "as if" the group decides the content.

REPUTATION VERSUS AUTHENTICITY

We have described these competencies via application to work settings. However, learning to relate in congruence with intention has broad application. Most of these skills apply to friendships and intimate relationships too. Wherever we go, we bring ourselves.

Reputation management is a critical difference between the personal and the professional. To be successful professionally, we all must manage our reputations. We do so to broaden our networks, put our best feet forward, to get job offers, promotions or raises, and to succeed in our day-to-day interactions. And yet, by managing reputation we forego the authentic connections that endure in order to present a manufactured facade. We forego the connections that motivate in the long term in order to manage short-term, utilitarian persona that simulate, but do not establish, connections.

Unfortunately, we all grow up fine-tuning our inauthenticity detectors; most people are quite skilled at it. Time after time, people report feeling more motivated to support one another's success when they've dropped a few masks and not been rejected. Perhaps we are all secretly relieved when others don't believe that our managed personas are the whole enchilada?

"There's a lot I want to experience, but not a lot of things I want to do."